FAS REPORT

United States
Department of
Agriculture
Foreign
Agricultural
Service
Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE WR 23-83

WASHINGTON, June 8--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

EC TRADE NOTES

As part of its ongoing effort to remove surplus wheat from the domestic market and thereby alleviate internal price pressures, the EUROPEAN COMMUNITY (EC) Commission has agreed to a special end-of-season intervention stocks program not used since the 1979/80 season. Under this program, 750,000 tons of minimum-quality bread wheat in France, West Germany and Belgium would be eligible for intervention purchase during June at about $200 per ton. Intervention stocks for bread wheat are normally open only during the first 3 months of the August-July marketing year. Although this new program is designed to take current wheat supplies out of producers/exporters hands, sale to intervention agencies could eventually facilitate additional EC wheat exports under the weekly intervention export tender program.

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The EC has decided to subsidize the incorporation of about 2.7 million tons of wheat into animal feeds as part of its efforts to reduce excess wheat stocks. Although the mechanism and the timing for implementation of the program have yet to be worked out, considerable opposition has already been voiced by various farm and market organizations. The plan provides no guarantee that traditional feedgrains will not be displaced by the subsidized wheat; therefore, it could adversely affect the import demand for U.S. corn as well as exacerbate the prevailing large exportable surplus barley situation.

DAIRY, LIVESTOCK AND POULTRY

JAPAN's Ministry of Agriculture, Forestry and Fisheries (MAFF), has indicated that beef import quotas will likely be set at 72,000 tons for the first half of Japan's 1983 fiscal year, an increase of 2,000 tons over the first half quota for 1982. MAFF gave no indication of quota breakdown (general, hotel or otherwise).

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COTTON

Cotton exports from the UNITED STATES increased for the second consecutive month reaching 640,000 bales in April, the highest level since April 1982. Cumulative August-April exports of 3.8 million bales, however, continued to lag behind last season. South Korea and Japan are the leading 1982/83 season markets for U.S. cotton. Exports to Taiwan and Western Europe are down from last season, while those to Eastern Europe and Canada are larger. Cotton exports of 112,000 bales have been made to the Soviet Union this season.

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According to its news agency, IRAN's government has increased the support price for the 1983 cotton crop in an effort to boost production. This action, coupled with the extension of production incentives reported to include free fertilizer, seed, and insecticide, should increase output. Cotton is normally planted in Iran during the months of April and May and harvested October through December. The 1982 cotton crop is estimated at 400,000 bales.

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In AUSTRALIA, the quantity and quality of the 1982/83 cotton crop has been damaged by excessive rainfall during the last couple of weeks, according to the agricultural counselor in Canberra. It is still too early to determine the exact impact on the crop since many fields are still under water and damage to harvested cotton in modules in the fields cannot be assessed until ginning resumes. However, in New South Wales and Queensland, fields have been flooded and there is some evidence of bollrot. When the rains struck, about half of the crop in both areas had been ginned.

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AUSTRALIAN greasy wool production is expected to fall 5 percent during the 1983/84 season to 675,000 metric tons, according to the Australian Wool Production Forecasting Committee. The drop in production is larger than the drop in sheep inventory (about 3 percent) and may be related to labor disputes with the sheepshearers' union and the effects of the recent drought.

TOBACCO

The PHILIPPINES, ranking in the top 20 major cigarette producing countries, reached a record production level of 70.6 billion pieces in 1982, an increase of 14 percent from 1981. The cigarette production increase was at the expense of cigars and chewing tobacco which declined 16 percent and 23 percent, respectively. The trend of increasing cigarette production and decreasing production of cigars and other tobacco products is expected to continue in 1983. Some cigarettes are also traded, but quantities are insignificant.

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The 1982 exports of unmanufactured tobacco, totaling 26,250 tons, were 11 percent below 1981, largely due to lower exports of native dark (cigar) tobacco which at 12,715 tons declined 20 percent from 1981. Flue-cured exports were up 9 percent at 12,676 tons. Imports of tobacco leaf in 1982 totaled 12,806 tons and were down 14 percent from 1981, with flue-cured tobacco making up three-fourths of the total and remainder being burley.

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MOROCCO's 1982 imports of unmanufactured tobacco are reported at 4,078 tons, compared with 8,153 tons and 9,199 tons imported in 1981 and 1980 respectively. The Dominican Republic was the largest supplier with 1,240 tons followed by Brazil with 1,205 tons, and the United States with 20 tons. Reduced 1982 imports were due to increased production in 1981 and 1982 as well as a high level of carry-over stock at the end of 1981. Larger imports are expected during 1983 with the current forecast of about 6,800 tons. Morocco does not export any sizeable quantities of tobacco.

Morocco's 1982 cigarette imports were also down to 920 tons from 1,534 tons in 1981, with the United States supplying about 90 percent of the total. Based on U.S. export data, the United States in 1982 exported to Morocco 1.2 billion pieces valued at $20.4 million compared with 1.8 billion pieces valued at $26.9 million in 1981. Morocco's cigarette import forecast for 1983 calls for approximately the same level as in 1982.

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In ECUADOR, effective May 6, the government increased prices of cigarettes at the manufacturer as well as retailer levels. The purpose of these increases, is reportedly to offset production cost increases and assure a reasonable profitabily to the industry. Retail price increases range from a minimum of 37.5 percent for black filter cigarettes to a maximum of 52 percent for international brands manufactured domestically. The price rise is not expected to depress consumption because wage increases have generally kept pace with the higher cigarette prices. However, most industry sources agree that the main effect will be in a shift of consumption from higher priced, locally produced international brands to national brands.

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JAPAN's Tobacco and Salt Public Corporation (JTC) reports that the total cigarette sales volume during the first four months of 1983 (January-April) rose 13.7 percent from January-April 1982. Sales of domestically produced cigarettes, which make up 98.5 percent of the total, rose 13.8 percent. Imported cigarettes, coming mostly from the United States and making up the remaining 1.5 percent of the sales, increased 10.1 percent. Most of the increase occurred during April as total sales during the month were up 45.7 percent over April 1982.

The sharp increase in sales is attributed to anticipation of the price increase which went into effect May 1, 1983, and increased the price of all cigarettes by one yen per cigarette, raising the average price of domestic cigarettes by 11.5 percent.

The price difference between domestic and imported cigarettes decreased from 110 yen per pack to 80 yen, as a result of tariff cuts that were implemented April 1. Although the tariff was cut almost in half, the actual decline in the price of imported cigarettes is only 10 yen per pack, as the one yen per cigarette price increase offset 20 yen of what would otherwise have been a 30 yen reduction. The smaller price spread between imported cigarettes and domestic cigarettes, should stimulate a gradual increase in sales of imported cigarettes.

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In CANADA, the Ontario Flue-cured Tobacco Growers Marketing Board and the Canadian Tobacco Manufacturer's Council have reached agreement on grower prices and conditions for sale of Ontario's 1983 flue-cured crop. A total of 97,522 tons is set to be covered under a minimum or base price of C$3.53 per kilogram, which is 2.6 percent above last season's price. Growers had a somewhat limited bargaining position during recent negotiatons with tobacco manufacturers because of the forecast of reduced domestic needs and ample world supplies.

FRUITS AND NUTS

Citrus production for 1982/83 in SELECTED COUNTRIES of the Southern Hemisphere is forecast at 13.3 million tons, marginally down from last year. Unfavorable weather reduced yields in Brazil, South Africa, and Australia. Forecasts by type for 1982/83, with 1981/82 estimates in parentheses, are as follows in tons: oranges--11,314 (11,548); tangerines--750 (804); lemons--619 (567); grapefruit--322 (294); and other citrus--326 (330).

BRAZIL's 1982/83 citrus crop, with harvest underway, is expected to be 2 percent below last year's output. Excessive rains in Sao Paulo State during the second bloom period in October lowered yields for this season. Last year's delayed harvest also is thought to have lowered the yield potential for the 1982/83 crop. Grower price negotiations for oranges in Sao Paulo State are not yet completed; however, all indications suggest a price decline from the $1.27 per 40.8 kilogram box growers received in 1982.

Favorable weather in most of ARGENTINA's citrus area and higher tree densities in new groves combined to make expected 1982/83 harvest levels the highest since 1971. Lemon production, estimated at 450,000 tons, is expected to recover from last year's frost reduced crop of 393,000 tons. The orange crop is forecast at 700,000 tons, marginally up from last season's output. Yield improvements in CHILE are expected to make 1982/83 harvest levels marginally above last year.

Dry weather in SOUTH AFRICA has reduced citrus production prospects for 1982/83. Forecast at 639,000 tons, the crop will be the smallest since 1977. Orange production may drop 10 percent to 483,000 tons. However, expansion of grapefruit bearing area is anticipated in 1982/83, and foreign demand is expected to be an important factor in supporting A 27-percent increase in production to 108,000 tons. If irrigation water supplies are not replenished around the beginning of October, more decline in South Africa's citrus yields can be expected next year.

In AUSTRALIA, both orange and lemon yields are forecast to be down from 1981/82 because of the June 1982 frost and drought during the growing season. Australia's 1982/83 lemon crop, estimated at 31,000 tons, is down 22 percent.

Citrus production estimates follow, in 1,000 tons: 1/

	1980/81	1981/82	Forecast 1982/83
Brazil	10,027	10,662	10,414
Argentina	1,454	1,451	1,560
South Africa 2/	768	670	639
Australia	478	510	468
Chile	122	135	140
Uruguay	115	115	110
Total	12,964	13,543	13,331

1/ Crop year: Southern Hemisphere--April/December
2/ Includes Swaziland.

COFFEE, TEA AND COCOA

The first WORLD green coffee production estimate for 1983/84 is 95 million 60-kg. bags, up 16.6 percent (13.5 million bags) from the revised estimate of 81.5 million bags for 1982/83. Recovery of the Brazilian crop from the frost damaged 1982/83 level more than accounts for the increase. Favorable weather and appropriate management practices are expected to result in a Brazilian crop of 31.5 million bags for 1983/84, up 13.75 million from 1982/83. Total South American production is forecast at 49.2 million bags as a result of increases in Brazil, Peru, Ecuador and Venezuela. Production in Colombia is expected to decline to 13 million bags from 13.3 million in 1982/83 due to reduced fertilizer applications and a poor price/cost relationship. The expected production increases in Venezuela to 1.15 million bags results from an excellent flowering, good weather conditions, improved management practices and improved farm-to-market roads for transport of both needed inputs and resulting production. Ecuador's production is forecast at 1.96 million bags, up 122,000 bags from 1982/83, due to a larger harvested area.

Total production in the North and Central American and Caribbean areas in 1983/84 is estimated at 16.2 million bags, down 575,000 bags partially due to declines in Costa Rica, El Salvador, Honduras, and Mexico, which were partly offset by an increase in Guatemala. The normal biennial production cycle is expected to result in a 230,000 bag reduction in the Costa Rican crop for 1983/84 to 2.07 million bags. In El Salvador, production is forecast at 2.8 million bags, down 100,000 bags due to problems with rust, political disruption in coffee producing areas, and lower returns realized by the producers during the past two seasons. Rust disease and problems in obtaining needed production credits are expected to lower Honduras' 1983/84 production to 1.35 million bags, down just over 100,000 bags from 1982/83. Coffee production in Mexico is estimated to be 4 million bags, down 100,000 bags from the 1982/83 level. In Guatemala, output is expected to be up 130,000 bags over the previous year to 2.6 million bags.

Africa's 1983/84 production is estimated to be 19.7 million bags, down 116,000 bags from the 1982/83 level. The dry weather, severe harmattan and numerous brush fires are expected to result in a 250,000 bag reduction in Ivory Coast's 1983/84 production to 3.5 million bags. The crop in Uganda is forecast at 3 million bags, and at 3.35 in Ethiopia. Kenya's crop is expected to remain near the 1982/83 level of 1.5 million bags, but dry weather and the delayed rainy season may still reduce the output. Cameroon is likely to produce about 1.9 million bags in 1983/84. Production in Burundi is expected to increase to 500,000 bags due to the cyclical pattern of coffee production combined with successful efforts to improve management and to rehabilitate declining coffee areas.

Output in Asia and Oceania is forecast at 9.0 million bags and 930,000 bags, respectively. Prolonged drought in Indonesia in 1982 substantially affected both the 1982/83 and 1983/84 production. Production for 1983/84 is forecast at 5 million bags, down 250,000 bags from the estimated 1982/83 output. India's 1983/84 crop is forecast at 2.45 million bags, up 350,000 from 1982/83 but down somewhat from the record 2.54 million bags harvested in 1981/82. Although dry weather has prevailed since January 1983 in the main coffee areas of India, the cyclical biennial bearing tendency and newer trees coming into production are responsible for the higher level of production for 1983/84. Drought has also affected the portion of the Philippines crop in Luzon and Visayas, but if normal rains occur in Mindanao before and during the critical November-December flowering, total production is expected to reach 1 million bags, up from 875,000 bags in 1982/83. In Papau-New Guinea, new plantings continue to come into bearing following the expansion into new areas in recent years. This, combined with somewhat better weather, is expected to result in a 1983/84 crop of 920,000 bags, up from 900,000 in 1982/83. Production by region follows (in 1,000 60-kg. bags):

	1982/83	1983/84
North and Central American and the Caribbean	16,813	16,238
South America	35,173	49,167
Africa	19,772	19,656
Asia	8,826	9,023
Oceania	910	930
TOTAL	81,494	95,014

WORLD FOOD PRICES

FAS has reinstituted the food price survey which has not been conducted since 1981. The survey will be made semi-annually, with the next survey scheduled for November, 1983.

The items surveyed are more typical of those purchased in the United States than those purchased in other countries. Prices may not be directly comparable due to differences in quality, packing, and seasonal variation in supply. Also, the appreciation of the dollar over the past 2 years has significantly impacted these prices when they are converted into dollars. These prices do show the relative cost of the various items in the cities surveyed and the wide range in price for some items between cities.

World Food Price Comparison Table

FAS Survey of Average Retail Food Prices in Selected World Capitals, May 6, 1983
(in U.S. dollars per kg 1/ or units as indicated, converted at current exchange rates)

Item	Bern	Bonn	Bras-ilia	Buenos Aires	Can-berra	London	Madrid	Mexico City
Steak, sirloin, boneless.	22.52	10.17	2.29	2.02	11.40	11.77	6.28	2.01
Roast, pork, boneless....	14.57	5.25	2.81	3.00	4.55	3.45	5.14	2.38
Broilers, whole..........	3.13	1.84	1.08	1.03	3.94	2.61	1.59	1.30
Eggs, dozen..............	2.50	1.08	0.56	0.72	2.92	1.22	0.68	0.37
Butter...................	8.02	4.17	3.88	2.67	3.95	3.03	5.77	3.16
Cheese, Cheddar..........	8.82	6.03	2.39	4.47	5.73	4.00	6.94	5.05
Milk, whole, liter.......	0.73	0.46	0.22	0.28	0.72	0.53	0.37	0.20
Oil, cooking, liter......	2.38	1.01	0.76	0.79	2.01	1.19	1.57	0.63
Potatoes.................	0.53	0.23	0.85	0.30	0.84	0.36	0.44	0.26
Apples...................	1.19	1.01	1.59	0.47	1.07	1.52	0.70	1.05
Oranges..................	1.21	1.04	0.14	0.35	0.72	1.22	1.03	0.24
Flour....................	0.90	0.61	0.23	0.36	0.78	0.39	0.47	0.12
Rice.....................	1.02	1.19	0.50	0.82	1.05	1.15	0.85	0.40
Sugar....................	0.70	0.79	0.35	0.34	0.71	0.72	0.57	0.20
Coffee...................	8.33	8.95	2.56	4.45	13.23	7.10	5.27	7.94

1/ 1 kilogram = 2.2046 pounds; 1 liter = 1.0567 quarts
Bonn: Steak, sirloin, -- bone-in

Item	Ottawa	Paris	Pre-toria	Rome	Seoul	Stock-holm	Tokyo	Wash DC.
Steak, sirloin, boneless.	6.26	8.43	6.42	8.94	10.43	11.42	28.41	8.80
Roast, pork, boneless....	4.39	5.44	4.29	5.43	4.45	11.79	9.23	7.25
Broilers, whole..........	1.77	3.51	1.65	3.09	2.34	3.35	3.24	1.08
Eggs, dozen..............	1.01	1.05	0.95	1.24	1.57	1.74	0.91	0.92
Butter...................	4.01	3.77	3.05	4.26	5.13	3.43	6.27	4.39
Cheese, Cheddar..........	6.71	5.22	3.88	6.53	NA	5.59	5.25	5.93
Milk, whole, liter.......	0.75	0.55	0.52	0.62	0.96	0.47	0.84	0.45
Oil, cooking, liter......	1.86	1.00	1.50	0.85	1.61	4.43	1.29	1.66
Potatoes.................	0.24	0.17	1.02	0.34	0.54	0.49	1.10	0.57
Apples...................	1.26	0.76	0.85	0.83	2.28	0.99	2.35	1.09
Oranges..................	0.66	1.01	0.72	1.10	NA	1.02	1.46	0.68
Flour....................	0.88	0.66	0.56	0.39	0.30	0.66	0.72	0.52
Rice.....................	1.61	0.99	1.01	1.38	1.14	1.59	1.45	0.99
Sugar....................	0.69	0.69	0.58	0.81	1.08	0.82	1.10	0.97
Coffee...................	4.89	5.92	8.02	7.57	15.45	3.07	13.56	6.81

1/ 1 kilogram = 2.2046 pounds; 1 liter = 1.0567 quarts
Ottawa:: Steak, sirloin, and Roast, pork, -- bone-in

Selected International Prices

Item	June 7, 1983		Change from previous week	A year ago
ROTTERDAM PRICES 1/	$ per MT	$ per bu.	$ per MT	$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%.	205.00	5.58	-.50	200.00
U.S. No. 2 DNS/NS: 14%...	187.00	5.09	+5.00	177.50
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--	179.50
U.S. No. 2 S.R.W..........	156.00	4.25	+1.00	N.Q.
U.S. No. 3 H.A.D.........	198.00	5.39	-2.00	178.00
Canadian No. 1 A: Durum..	209.00 15/	5.55	-6.00	N.Q.
Feed grains:				
U.S. No. 3 Yellow Corn....	148.00	3.76	+1.50	130.00
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--	N.Q.
Feed Barley 3/...........	N.Q.	--	--	N.Q.
Soybeans and meal:				
U.S. No. 2 Yellow.........	249.75	6.80	+4.25	256.50
Brazil 47/48% SoyaPellets 4/	219.00	--	+4.00	234.00
U.S. 44% Soybean Meal.....	216.50	--	+3.00	224.00
U.S. FARM PRICES 5/				
Wheat.....................	132.64	3.61	+1.10	128.60
Barley....................	86.35	1.88	+8.27	82.67
Corn......................	120.86	3.07	+2.76	99.60
Sorghum...................	115.30	5.23 6/	+7.05	93.03
Broilers 7/..............	1080.25	--	-1.76	N.A.
EC IMPORT LEVIES				
Wheat 8/.*...............	99.23	2.70	-.72	116.25
Barley....................	108.13	2.35	+1.59	87.70
Corn......................	72.95	1.85	-2.43	101.65
Sorghum...................	80.03	2.03	-3.74	96.00
Broilers 9/..............	279.00	--	-6.00 13/	275.00
EC INTERVENTION PRICES 11/				
Common wheat(feed quality)	179.00	4.87	-3.60	188.09
Bread wheat...............	196.32	5.34	-3.94	215.98
Barley and all other feed grains.......	179.00	--	-3.60	188.09
Broilers 12/.............	1127.00	--	-24.00	--
EC EXPORT RESTITUTIONS (subsidies)				
Wheat.....................	28.68	.78	--	73.24
Wheat flour...............	--	--	N.Q.	N.Q.
Barley....................	N.A.	--	--	N.A.
Broilers 9/..............	200.00	--	-4.00 13/	183.00
Sugar, refined 14/........	N.Q.	N.Q.	N.Q.	N.Q.

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Twelve-city average, wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects exchange rate change and not level set by EC. 11/ Reflects change by EC effective Feb. 1, 1983 from 31.8 ECU's/100 kg to 33.15. 12/ F.o.b price for R.T.C. whole broilers at West German border. 13/ Reflects exchange rate change and not change in level set by EC. 14/ Week of May 18-May 25, based on a maximum subsidy rate of 25.708 ECU's per 100 kilograms. 15/ July Shipment. N.Q.=Not quoted. N.A.=None authorized. Note: Basis June delivery.

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[1] Available from FAS, Information Division, Room 5918 South Building.

[2] Prepared jointly by USDA's Foreign Agricultural Service, Economic Research Service and the World Agricultural Outlook Board. Limited number of copies and subscription information are available from the World Agricultural Outlook Board Room 5143 South Building, Washington, D.C. 20250. Telephone (202) 447-5447.

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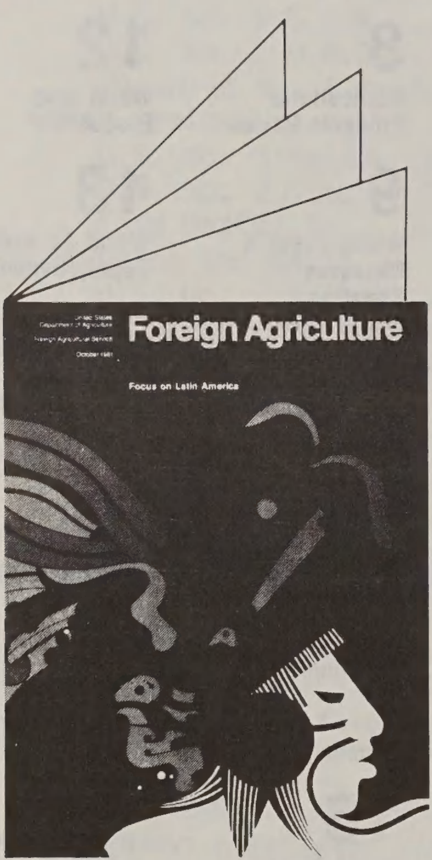

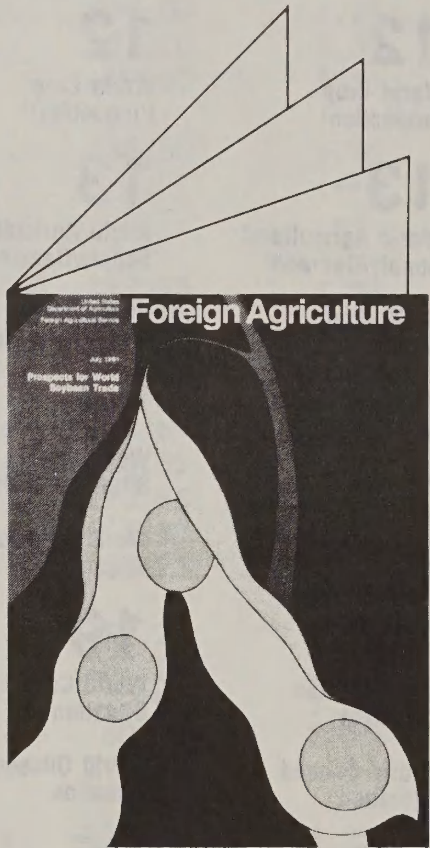

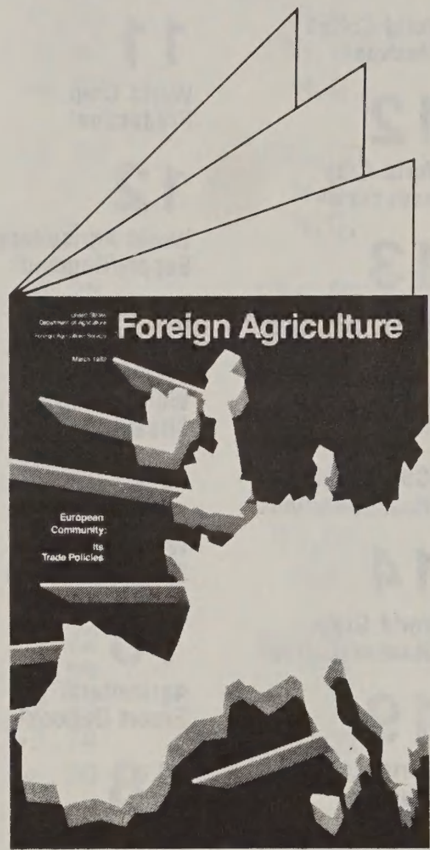

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